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Goals Project. Goals Project consultations, 1994-1995.

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Materials

① Agenda

shared vision

- work w/ institutions

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Mars

- ~ Cases
 - Attents
 - Bath
 - Camp
 - School

- Projected activities

- Div. of Labor

MEMO TO: Alan, Barry, Gail, and Nessa
FROM: DP
RE: The agenda for our upcoming meetings.

In order to focus our Monday morning conference call, I've drafted a proposal for our Cambridge/New York meetings. It begins with a summary of basic tasks and then goes on to sketch out an agenda. Please note that as these materials are being sent to you, I have not yet seen the materials that Fox and Marom said they would be sending to us on Monday; nor have I yet drafted the short piece I propose to write as background to our Thursday meeting. If one or both of these become available prior to our conference call, I will send them along; please check incoming faxes prior to our meeting at 10:45 a.m. (New York Time).

Lest we lose sight of them, I wanted to take note of a few of the points made during our last meeting. I begin with possible directions for the Goals Project that were noted in the course of our last conference call and then proceed to note concerns that were expressed. Following this is the proposed agenda for our upcoming meetings.

SOME POSSIBLE FUTURE DIRECTIONS (Based on our last conference call)

1. Pekarsky's two-pronged proposal that emphasizes:

a. via seminars, videos, publications, etc. aimed at appropriate constituencies (especially lay and professional leadership), building a culture and a communal discourse that take vision and goals seriously.

b. through work with select institutions, develop i) knowledge-base concerning the way to forward a goals agenda; ii) knowledge-base relating to coaching; iii) case-studies of the good things that can happen -- as well as the difficulties - when an institution struggles with a goals-agenda.

c. down-the-road, develop cadre of coaches and invite genuinely select institutions to work with them.

2. Curricularizing the Educated Jew Project: develop strategies and materials that will enable North American communities and institutions to use these materials as significant tools in the process of self-improvement. Two dimensions of such an effort were discussed during our meeting:

a. a grid that will identify that central

dimensions that need to be taken into account in using a conception of an educated Jew to develop an educational program;

b. the kind of process that is likely to engage, to motivate, stake holders in an institution to engage a serious process of institutional growth that makes use of these materials.

3. Encourage Seymour and Marom to teach "us", the North American personnel, how to draw out of our own scholars papers comparable to the "Educated Jew" papers. Is there a grid for "the Educated Jew"? This would be background to a serious effort to encourage key North American educators to develop their own visions of an educated Jew.

4. For those who have come to believe that issues pertaining to vision and goals are at the heart of what we're about, a critical challenge is to ensure that CIJE's various activities (in the areas of, say, personnel and community mobilization) include issues relating to goals and vision as central dimensions of what we do.

5. One activity that was proposed was an annual Mandel/CIJE collaboration around a case-study that considers a particular kind of institution's efforts at growth.

SOME CONCERNS

1. Justly or unjustly, concerns have been expressed that although we preach an agenda that insists on the importance of content as well as process, the content-agenda of the Goals Project has not received adequate attention in some of the programs we have developed and implemented.

2. Seymour has expressed two views that are in seeming contradiction: a) "You (Gail and Barry) can lead an institution through a goals-process with hands tied behind your back.," and b) "You don't know enough to bring potential coaches together for a discussion of coaching-related matters." These apparently - and I stress 'apparently' -- contradictory views need to be reconciled.

3. If we do change direction and put the coaching-agenda on the back-burner, we need to find a compelling way to describe this change to our CIJE Board and sub-committee (the Colman Committee).

4. Nessa expressed an interest in our convening a high - indeed,

From: #r at @ 608-233-4044
To: Daniel Pekarsky at @ 262-9074

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super-high - level group of lay-leaders to think together about issues relating to goals and vision in relation to the larger predicament of American Jewry.

5. In our vision of an ideal world, we have one conception of what it would mean to work with an institution, agency, or community. But the real and living institutions and individuals who approach us for help may not be ready or able to approach their work with us in the ways we might hope. How can we work with them both to meet their experienced needs and "to raise them one notch higher" -- if not more?

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GOALS PROJECT CONSULTATION, July 1995
preliminary draft

PRIMARY TASKS:

- 1, 4, 2
3
1. Arrive at a shared sense of the Goals Project's principal mission and the goals that flow from that mission.
 2. Arrive at a shared sense of the principal activities through which this mission and these goals will be achieved, along with an appropriate time-line.
 3. Arrive at a shared sense of the roles of CIJE and the Mandel Institute in the development of the project -- in carrying out the project's principal activities, in evaluating the project's work, in articulating and deciding among alternative courses of action. Included in #3 is the development of mechanisms that will assure timely and effective communication and coordination among the various participants in this project.
 4. Deepen our understanding of what is involved in working with institutions around a serious Goals Agenda, with an eye towards refining our understanding of the skills, understandings, sensibilities, and knowledge-base needed by "coaches" (our current term for those individuals who will serve as resource-people to institutions engaged with a Goals-Agenda).

RULE OF PROCEDURE: The plan is to get far enough on #s 1 - 3 by the end of Thursday to enable us to take up #4 on Friday (with the possibility of returning to the first 3 items on Sunday). It is, however, understood by all participants that should we not get as far as we think necessary on Thursday's agenda, we will continue with #s 1-3 into Friday, deferring #4 for another occasion. Rob Token, who will be participating in the discussion of #4 fully understands this possibility.

BACKGROUND MATERIALS FOR THE SEMINAR

For items 1 - 3,

Pekarsky's recent piece on Goals Project Priorities.

Pekarsky's brief piece written as background to our upcoming deliberations. (to be written)

The Mandel Institute piece identifying themes pertinent to our deliberations concerning the

Also include Oct. meeting

future of the project (to be sent to me in Madison this Monday).

For Item 4:

The written summary of our February meeting.

Pekarsky's short piece, "Working with Institutions"

Possibly a "case" which DP has asked Rob Toren to develop as a springboard to a discussion of what it might mean to work with an institution.

THURSDAY AGENDA

1. Background: Brief overview of developments and issues that have emerged since February, culminating in a formulation of the critical issues to be discussed and decided. (Pekarsky)

2. "The Goals of the Goals Project"

Based on the background presentation and the pertinent written documents, a chance for participants to offer competing and complementary views of the principal desired outcomes around which this project should be organized. For purposes of launching this discussion, Pekarsky's short written piece will propose an answer to this question; conceivably, the piece coming from Jerusalem will serve a similar purpose.

3. Subsidiary goals and the pattern of activities that are desirable in light of the project's overarching goals: what are the principal things we should be doing?

4. The respective roles of CIJE and the Mandel Institute in shaping, implementing, and evaluating the Goals Project's activities and agenda; and the development of mechanisms that will ensure a maximally productive working relationship.

Thursday will be a successful day if we can achieve a measure of closure concerning all these matters. Closure of a desirable kind implies:

- a. Genuine agreement among those present.
- b. Decisions made honor existing commitments.
- c. Decisions made forward the larger CIJE agenda, especially with regard to content and goals.

FRIDAY'S AND MONDAY'S AGENDA

1. Background presentation by Pekarsky concerning the status of the "working with institutions" agenda, with special attention to the "Socratic gadfly" discussed in February and Pekarsky's "Working with Institutions" piece that grows out of those meetings.
2. Discussion of the ideas developed in #1, with attention to what we've learned (e.g. through Marom's experience at Agnon, Pekarsky's in Milwaukee, and Toren's in Cleveland) since February.
3. Examination of Toren's "Case". This case will be a written description, summarized by Toren, of an institution that is interested in serious self-improvement. Our energies will focus on how, given what the case puts before us, we would proceed -- what additional information we feel we need, what initial activities seem promising, what kinds of outcomes we would hope to attain, etc., etc.
4. Based on #3, an attempt to draw out some general points or hypotheses concerning institutional pre-conditions and the nature of the work.
5. Based on #s 1 -- 4, a renewed attempt to understand the characteristics needed by coaches.
6. Depending on how we have interpreted the Immediate Goals Project agenda, we might go on to discuss the kinds of people to bring in as coaches, how to bring them in, and how to equip them for the work at hand. This session might be defined as a preliminary attempt to plan an initial conference for coaches, or at least to identify the outcomes for such a conference.

MEMO TO: Seymour Fox and Daniel Marom
FROM: Daniel Pekarsky
RE: Goals Project activities
DATE: May 30, 1995

Attached you will find materials emerging out of recent Goals Project activities: a) a general update on the project; b) a rough summary of recent meetings held with a number of institutions in Milwaukee, some of which may well serve as sites for some of our upcoming experimental work; this summary is very rough, largely reflecting my need for detail concerning various matters; c) first drafts of letters to these institutions. I would welcome feedback on all or any of these.

By the time you receive this, I am hopeful that we will have begun conversations aimed at planning our July meetings; certainly we need to begin with this right away. If, for any reason, we don't succeed in speaking over the next day or so, my assumption is that I will try to develop a rough first draft of desired outcomes and seminar content by middle of next week, so that the conversation among us concerning the seminar can get launched in a serious way.

I look forward to our being in touch.

MEMO TO: Alan Hoffmann
FROM: Daniel Pekarsky
RE: Goals Project Update
DATE: May 27, 1995

INTRODUCTION

Below is a succinct summary of major developments with the Goals Project in the last month or so. In general, but with one qualification, we are on track with the agenda we have set for ourselves for the months ahead. As you know, this agenda has two major dimensions:

a. Goals Seminars (of the kind held in Jerusalem, Milwaukee, and Atlanta), animated by two aims: first, encouraging a new kind of discourse among leaders in Jewish education - a discourse that focuses their attention on questions of vision and goals, as well on the relationship between goals, educational practice, and educational outcomes; second, identifying institutions that are ready for intensive work on a goals-agenda with guidance by CIJE.

b. Building capacity, especially the kind of capacity that will be necessary to work with educating institutions around a goals-agenda. The requisite capacity that needs to be developed is of two kinds: knowledge-base and personnel.

I will comment about developments in both of these areas below.

GOALS SEMINARS

Milwaukee Goals Seminars. In May, the last of 4 scheduled seminars was held. Unlike the preceding three, the last session was individualized --which is to say that I met with each institution separately. Each institution was to have met in preparation for this meeting, with an eye towards identifying goals-related issues that it felt a need to address. For a detailed discussion of these meetings, see the lengthy summary that I have prepared. In general, I would describe these sessions as more successful than I would have anticipated; and I believe that there is considerable interest on the part of at least three institutions in moving on to Phase II, which involves institution-specific projects aimed at becoming more vision-driven, goals-sensitive institutions. Follow-up meetings have been planned for the month of June. More on this in the building-capacity section below.

Before concluding this section, a number of miscellaneous observations:

1. Our impressionistic assessment of the Milwaukee seminars is very positive, and we are now in process of trying to get some formal data from the participants. We'll report on this when the findings are in.

2. I want to add that two of our seminars profited immensely from the availability of the Educated Jew pieces to our participants. These papers have a remarkable capacity to provoke serious, high-level thinking.

3. In projected work with institutions, there will be a "taking stock" dimension, and I feel the need to revisit the question of MEF support in an effort to generate institutional profiles.

4. The work we have done to date with institutions confirms our intuition that, in addition to contributing to their welfare, this work has the capacity to contribute significantly to our own knowledge-base.

Other projected seminars. As you know, we have been hoping to hold local, regional, and/or national seminars next year, and we have made progress on this front. For example, I have been in touch with Michael Paley of Wexner concerning our planned involvement in their scheduled December seminar for some 400 Wexner graduates; and I have been in conversation with Atlanta's Lead Community Project coordinator, Steve Chervin, concerning Goals Project involvement in their effort to work with institutions. Similar discussions have been under way with Cleveland's Rob Toren, who would like support from CIJE's Goals Project in his work with two local Day Schools. As I have indicated in conversation, while I am pleased with our progress on this front, I would feel better if we had a clearer sense of "the big picture" for next year, and of the way these individual initiatives fit into it. This means developing a conceptualization of Goals Seminars across the year and across the country. Though it may not be possible to finalize this conceptualization until after we've emerged from our building-capacity discussions this July (see below), my sense is that developing a preliminary Goals-seminar map for next year is an immediate and important priority. I am hopeful that you, Gail, Barry, and I can discuss this matter soon.

BUILDING CAPACITY

As noted above, our "building capacity" agenda has two dimensions. First, we need to better understand how we can best help educating institutions become more goals-sensitive and vision-driven; and second, we need to identify, recruit, and bring along a cadre of individuals who can serve as coaches to institutions interested in pursuing a goals-agenda.

Developing a knowledge-base. We have recognized that our efforts at developing a knowledge-base must have at least three different elements:

1. reviewing work in other arenas - e.g., the worlds of general education and business - that has been concerned with ways of encouraging the participants in an institution to become mobilized around a set of compelling goals.
2. high-level seminars (of the kind held with Professors Scheffler and Howard and with the staff of the Mandel Institute in February), aimed at refining our understanding of what a goals-process should be aiming for and of the way CIJE staff can facilitate this process;
3. experimental work with institutions, aimed at testing our preliminary hypotheses and strategies, as well as surfacing new and pertinent insights, strategies, and issues.

While the first two of these three elements have been at the heart of our work, the third has awaited our identification of appropriate institutions. Our hope was that two or three such institutions would emerge from out of the series of Goals Seminars held this spring in Milwaukee. Fortunately, this has turned out to be the case. Based on my most recent set of meetings in Milwaukee this date, I anticipate work on a goals-agenda of varying intensity with approximately 3 institutions next year.

While one of our principal interests is in helping these institutions make progress, we will approach this work in such a way as to maximize our own learning concerning the best way to facilitate a goals-process on an institutional level. In addition to this work in Milwaukee, I expect that we will also learn a great deal from Marom's efforts with the Agnon School in Cleveland and Rob Toren's work with the Schechter School in Cleveland. Carefully recording and studying our experience in these institutional settings is critical at this juncture.

Developing institutional coaches. As you will recall, our original plan had been to identify some 10 to 15 possible coaches and to bring them to an intensive summer seminar, in preparation for beginning to assign them to educating institutions in the course of next year. As of now, we have succeeded in identifying and eliciting the interest of over 10 very promising individuals who are eager to participate in the proposed seminar. But, as you will also recall, we have decided to postpone the proposed seminar for these individuals.

The reasons for the postponement were in part logistical, e.g., the unavailability of certain critical individuals in the

summer, but in part more substantive. The principal substantive reason for postponement was our sense that we needed to know somewhat more about the actual work with institutions prior to trying to train these coaches.

Our revised plan is to hold a smaller seminar this summer that focuses on the work with institutions, a seminar that will include core-staff from CIJE and the Mandel Institute, as well as Israel Scheffler of Harvard University and Amy Gerstein of the Coalition for Essential Schools. Also participating at this seminar will be an additional individual who will serve as a coach down the road. It is our expectation that the progress we will make at this seminar, coupled with what we learn through the work being done with educating institutions in Milwaukee and elsewhere in the months ahead, will put in a significantly stronger position when we begin working with prospective coaches.

We are now working on the agenda and materials for the July seminar. It will be held in Cambridge and will be developed primarily by myself, Barry Holtz, and the staff of the Mandel Institute.

As a way of keeping actively engaged those individuals who have expressed an interest in the Goals Project, I am also planning somewhat shorter seminars for later this summer. Already scheduled is a seminar for select lead educators in Cleveland, at the end of July.

CONCLUSION

Our developing sense of direction. As noted above, my sense is that we are steadily and thoughtfully making progress on the Goals Project Agenda. It is reasonable to hope and expect that through the Goals Seminars, we will help spawn a culture in Jewish education that is seriously attentive to issues of vision and goals, so that increasingly communal and institutional leaders scan educating efforts with an eye to these important matters. It is also reasonable to expect that, suitably studied, our experimental coaching work with select institutions this year will significantly refine the knowledge-base needed not just to coach institutions but to train coaches. To the extent, moreover, that our seminar-efforts and coaching-efforts are successful and well-publicized, they will help to create a desirable kind of momentum that will facilitate our future work.

Community vision. Note that this update has not spoken to the issue of Community Vision, which continues to be on the back-burner as we approach other more pressing matters. Because I believe the community-vision topic to be important and challenging, and because there is, as far as I can tell, great interest in this matter on the part of a number of constituencies, I find it problematic that we have not been able to make more head-way on this front. I would therefore like to close by proposing that we make more room for this dimension of

our work.

This community-vision agenda would build on the CIJE statement concerning community-vision already on record (See the materials for our February, 1995 Steering Committee meeting), and it would take full advantage of the expressed interest in this matter on the part of John Colman's committee. There are two inter-related challenges in this domain: first, to better conceptualize what it means to have a communal vision and how having one would contribute to communal life and to Jewish education; and second, to understand how a community might set about working towards such a vision.

At the April meeting of Colman's sub-committee we discussed the possibility of a special meeting organized around the theme of Community Vision, and I continue to believe this a very good idea. Though I think this very premature, I also think it might be of interest to explore with key stake holders of a single community why and how they might be interested in participating in an effort to nurture a Community vision within which Jewish education could be nested. For different reasons, Milwaukee, Cleveland, or Atlanta seem possibilities here.

Given our finite human and other resources, I recognize that to undertake the Community Vision/Goals agenda seriously might mean cutting back in certain other areas, and I have no immediate suggestions concerning where and how it might be done. But this matter might be more reasonably addressed if and when we've succeeded in clarifying what a compelling community-vision agenda might look like.

MEMO TO: CIJE Core-Staff (Alan, Barry, Gail, Nessa)
FROM: Daniel Pekarsky
RE: Milwaukee Goals Project: Phase II launch
DATE: May 25, 1995

INTRODUCTION

As you know, on May 22 and 23, I was in Milwaukee to meet with representatives of institutions who had participated in our winter/spring Goals Seminars. The idea behind these sessions is that against the background of the three earlier meetings, it would be valuable to meet individually with participating institutions in order to think through how, if at all, they might go forward with the work of becoming more vision-driven or goals-sensitive; at this meeting, discussion was also to focus on how, if at all, CIJE might be involved in planning and implementing proposed efforts. It was agreed that in preparation for this individualized session, the representatives of each institution would hold a meeting at which they would a) identify seminar-related issues that they felt applied to them, b) determine which of them needed immediate attention, and c) begin thinking about possible strategies for addressing them. A written summary of the results of this deliberation was to be sent to me in advance of the meeting.

Of the institutions that had participated in the earlier seminars, two expressed an interest in meeting with me but, for different reasons, requested that we defer the meeting. In the case of the JCC, postponement until August was requested due to Jay Roth's extended stay in Israel. In the case of Y.E.S. (Yeshiva Elementary School), postponement was requested on the ground that it was in the midst of a transition from its old principal to a new one. A third institution, the Hillel Academy, had no interest in meeting with me - something which did not at all surprise me in view of their obvious disengagement from the very beginning of this process.

This left 4 institutions that expressed an eagerness to meet with me: the Torah Academy of Milwaukee (the very small Orthodox girls' high school); the Milwaukee Jewish Day School; Temple Sinai; and Congregation Beth Israel. Of these institutions, two had met to prepare for this meeting, and only one of these (Congregation Beth Israel) had sent me anything in writing in advance of our meeting.

I entered these meetings without any strong or clear sense of what the desired outcome would be -- except that I hoped to emerge from one or more of them with the sense that a foundation had been established for continuing work with CIJE, the kind of work that would allow us to do some of the preliminary work with institutions that we have recognized to be so critical at this point in the development of our project. In very different ways, I think this hope seems to be materializing with 3 of the 4 institutions I met with. In none of the cases did we speak of

the institution becoming in any formal sense a Goals Project affiliate institution -- in part, because we haven't developed any clear guidelines concerning what would be involved in such an affiliation. Rather, in each case, what emerged was a shared sense that the institution wanted to go forward with a Goals Agenda and that, in different ways CIJE would work with them, assuming continuing seriousness on their part.

Below I will summarize what happened in these sessions. Incidentally, Ruth Cohen accompanied me to all four meetings and was generally very helpful. I am beginning with the discussion held with representatives of the Torah Academy of Milwaukee, which was in one sense the least successful, but in other ways very interesting; and I will then go on to discuss what happened in the other three sessions, with attention to lessons learned and next steps.

Please note that my intention is to draft a letter to each of the institutions I met with over the next week in an effort to frame and interpret "what happened" at the meeting and what the next steps are or should be. My sense is that this letter will be an important part of the process. I mention this because reactions and suggestions you have as you read the summaries that follow will be very helpful to me as I draft the proposed letters. Thanks.

TORAH ACADEMY OF MILWAUKEE

I will not spend much time on my conversation with two representatives of T.A.M., the reason being that their agenda for the meeting did not directly concern vision and goals. Indeed, they feel - probably correctly - that they have a very strong sense of purpose. Rather, their interest is in changing for the better the community's perception of them as Ultra-Right Wing and as incapable of providing a quality-education to adolescent girls. Though I had and continue to have some uncertainty concerning why they wanted to meet with me at all (given that, by this time, they knew very well, that the Goals Project is not in the Public Relations business), in fact the conversation was very interesting. It's not just that Bernie and Alan (Forgive me, I don't have last names at this point, but I do want to keep a record of who participate) are very thoughtful people who are in their own way "zealots" when it comes to the development of their very interesting institution; beyond this, the conversation was of interest because it led back to larger questions concerning community-vision and what it means to be a pluralistic Jewish community that allows for and encourages educational and Jewish diversity.

In the course of this discussion, the idea surfaced of generating a community-wide Guide to Education in Milwaukee (now that I think of it, a real GEM) that would give vivid portraits of the range of educational opportunities available in the Milwaukee Jewish community. The Guide could be in the form of a

booklet/brochure or perhaps a video. I mention it because it strikes me as a vehicle through which an institution like Milwaukee could address larger issues of "Community Vision". Perhaps we should discuss this further, as we think about ways of generating strategies for addressing the Community Vision dimension of our work.

CONGREGATION BETH ISRAEL

Background. Congregation Beth Israel is the only institution that had honored my request for a written statement prior to the meeting. That they followed through with this is one index of Rabbi Lee Buckman's seriousness and dependability: he is thoughtful, seriousness, and well-organized; and if he buys into this process in a serious way, I think this could be an interesting working-relationship. What I am not sure of is how much support he has for a serious Goals-process in his institution at this time.

Four local circumstances are worth noting at the outset. The first is that Lee is just now entering into his role as Senior Rabbi in the congregation, replacing Rabbi Panitch in this position. I am not yet sure how this will affect his desire to enter seriously into a Goals Process or his ability to generate support for such an effort within the institution. The second circumstance concerns his educational director, Pam. I am not sure how stable she feels her position is in the school, and I think she's got a lot of concerns about the way the school does business and about its relationship to the Congregation as a whole. She was a participant in the Harvard Leadership Seminar and seems enthusiastic about participating with us in Goals-related work; I think she views it as a chance to express and help remedy matters that concern her. The extent to which she and Lee are real partners in matters relating to the school is something I'm not yet sure of. There are times when I sense (coming from her) a measure of professional unhappiness. The third possibly complicating circumstance is Ruth Cohen's relationship to this institution: she is a new member of this Congregation but has felt gently rebuffed by Lee when she has suggested involvement in the Congregation's educational reform efforts. The fourth complicating circumstance is Louise Stein's relationship to this process. She is a member of this Congregation and has been eager for Lee and the Congregation to become involved with the Goals-agenda; what impact - negative or positive - this has had or will have, I am not at all clear on at this point.

The memo Beth Israel sent me (I will fax it to you) proposed that their first step would be to educate the Congregation's Board of Directors concerning that version of Conservative Judaism's vision that Lee hoped to better embed in the life of the Congregation. Through a year-long study process (possibly

appended to Board meetings), participants would become identified with the vision, and would then work with Lee to better pass it on and embed it across the various domains of congregational life. Along with this general statement of intent came a first draft version of the vision that Lee had drafted.

The meeting. Because the meeting had been scheduled over lunch (a bad idea and not mine) and because it was held in the main room of a restaurant (a second bad idea!), I was initially quite worried about how it would go. Though the setting did in some ways interfere with our work (preventing certain kinds of activities and offering varied interruptions and distractions), it was nonetheless productive.

Participants at the meeting included (again, forgive my unfamiliarity with last names and formal positions): Ruth, myself, Rabbi Buckman, Pam the principal, Stuart, and Debbie.

Lee's formal proposal provided the desired starting-point for the conversation. As background to the proposal, Lee explained that many members knew very little about the outlook of Conservative Judaism, and that he felt that therefore the kind of educational effort he proposed was critical. He added that there exists a model (and a curriculum) for what he proposes to do within the Conservative movement. Among the concerns raised by his proposal (by me and others at the meeting) were the following:

1. the proposal was ambiguous with respect to whether the purpose was to pass on to the membership a pre-existing vision, or whether rabbi and participants would jointly develop a vision.
2. was the hope animating the proposal that the leadership of the Congregation would better understand the institution's vision, or was it that it would also come to identify with this vision? If the latter, what implications should this have for the organization of the proposed process of study? Might it, for example, be wise to start with an intensive Retreat-like experience designed to engage participants in a personal way in the critical questions? How intensive a process would be necessary - and was the proposed idea of tying these study-sessions to Board Meetings a wise one?
3. Nobody who has agreed to serve on the Board is under the impression that he/she is expected to participate in this kind of on-going study activity. Might this be a source of resentment and frustration?
4. Related to 3., the thought was expressed that some members of the Board may have no or little interest in this kind of study, while at the same time there might

well be other members of the Congregation who are ideally suited to this kind of study activity and who might, in the long run, play a pivotal role in helping to embed the vision arrived at via the seminars in the life of the Congregation.

5. Related to 3. and 4., the point was made that it may be precisely because some of the leadership is not presently interested in study and in issues of Jewish vision that it would be desirable to engage them in the process.

6. Though exploring issues of vision directly along the lines suggested by Lee (but revised in course of the meeting) might be wise, is it really wise to postpone doing any related and preliminary work in the educational arena. In particular, might it be worth entering into one or more "taking-stock" activities in the near-future, with an eye towards better understanding what is currently happening and being achieved? For example, what statements of goals presently exist? How clear are they? How widely known are they? How widely shared, and by whom? How are they reflected in formal curriculum? What is the relationship between formal curriculum and what happens in classrooms? To what extent is the curriculum-in-use the same from year to year, etc.?

7. A specific idea related to #6 and earlier generated by Lee and Pam was to do a study that focused on subject-matter knowledge in a particular domain before and after a year of study -- an idea animated by the hope of showing that real learning does take place during the year.

Out of conversation concerning these various matters, the following generally shared ideas emerged:

A. Vision as institutional theme.

In the course of discussing Lee's idea that during the coming year the Congregation's Board focus on the theme of institutional vision, i.e., on what it means to be a Conservative Jew, the idea surfaced that it might be fruitful to encourage such discussions in the coming year amongst a variety of congregational constituencies. That is, it become an institutional theme, finding expression in a wide variety of settings.

B. "Taking Stock": a candid assessment of the present

Simultaneous with the effort to reflect on questions of vision, various "taking stock" activities could go on that focus on the congregation's educational efforts. Though the precise

content of these investigative activities was not clarified, the intent would be to grow clearer concerning a variety of matters that jointly clarify the current state of goals and vision in the consciousness of key constituencies and in the day-to-day life of the Congregation's practices.

It was recognized that a plan would need to be developed that identified the kinds of data that would be worth gathering. This initial plan could then be scanned with attention to at least the following matters: 1. Is the information "get-able" and if so, how? 2. Are there risks and/or other costs associated with inquiring into certain matters? In particular, can data-collection be organized in such a way as to minimize the sense of threat or defensiveness that it might stimulate? 3. Who should be collecting the information -- and in particular, to what extent can members of the congregation themselves enter into this process? 4. Might CIJE -- in the person of myself or the MEF folks make a contribution in this area? Lee explicitly expressed an interest in CIJE involvement in this area, if that were possible. I was non-committal but indicated that some involvement was a possibility.

It was, I think, understood that this discussion was at best preliminary, and it was agreed that Lee Buckman and I would meet in early June for further discussions. I indicated -- but will want to re-emphasize in a letter - the need to develop a serious plan that takes into account needs, resources, as well as Lee's own situation as a newly-installed Senior Rabbi. The challenge, as I see it, is to build on the discussion just held in such a way as to guide Lee and his team towards activities and issues that will lead to serious thinking about vision and goals in the life of the congregation and its school.

SINAI TEMPLE

Background. Temple Sinai is a Reform Congregation, now in a transitional, somewhat unstable stage: its Rabbi, Terry Buchmann (sp.??), is on his way to a new position in Miami, and his successor will not be in place until next April. An interim rabbi will shoulder various congregational responsibilities until next April. The school's educational director, Kathy Schwartz, is a recent graduate of HUC and is starting her second year on the job. There is a new School Board Chairperson, just beginning her tenure in this position.

Neither Terry nor the new School board chairperson regularly participated in the preceding Goals Seminars, but three other individuals, including Kathy Schwartz, did -- and those three attended this week's meeting along with Terry and the new School Board Chair. I approached this meeting without much enthusiasm, in the belief that it would be more promising to work with MJDS (see below) and Beth Israel. This belief was grounded in my

knowledge of the institution's transitional situation, coupled with the fact that certain very key stake holders had not participated in the seminar. HOWEVER, much to my surprise, the meeting proved very serious and thoughtful, and some interesting ideas for moving forward emerged from it. The fact that the new School Board person was there - and that she seems very interested in "making a difference" - proved, and may in the future prove, very useful.

The meeting. Not surprisingly, given the institution's circumstances, there had been no effort to prepare for this meeting, and we agreed to spend the evening in the kind of open-ended conversation that might lead to the identification of meaningful ways to enter into a goals-process amidst the present state of instability. In view of the fact that the School Board Chairperson had missed the earlier seminars, I began with a summary of issues and questions that seminar had explored, and then I opened it up for conversation. The conversation was spirited and thoughtful, and I sensed a real interest in continuing with this process.

It emerged in the course of the discussion that what Terry described as a fairly serious study and evaluation of the school had been done about a year and a half ago; this study included an attempt to get at attitudes of key constituencies. It was agreed that it would be important to look carefully at this.

It also emerged that, for logistical reasons (rather than because of demand) the school had cut back from 6 to 4 hours a week within the last couple of years. The cut-back was "sold" with the rhetoric that nothing would be lost -- but Terry indicated his sense that in fact quite a bit had been lost! Recently, partly as a response to this situation, the School's Modern Hebrew program was dropped. Terry indicated his belief that one of the new rabbi's important challenges will be to overcome the logistical obstacles that stand in the way of restoring the lost school-hours.

While troubled by their cut-back in time, I used it as a vehicle of pressing the importance of the goals-agenda: namely, precisely because there is scarcity of time and resources, it is critically important to be very clear about what one wants to accomplish, so that the little time available can be effectively used. Similarly, although the removal of modern Hebrew may be troubling, it highlights an important matter: namely, given limited time and resources, it may be necessary to make some very hard choices concerning what the Congregation's fundamental educational priorities are.

At some points in the meeting, there was a tendency to slip back into a very narrow understanding of "goals and objectives"; I tried to remedy this -- I think, pretty effectively -- by reminding them of the larger predicament of American Jewry and the need to be thinking about educating the young towards forms

of Jewish existence that they would find meaningful on a variety of different levels.

At a number of points they pressed me about the direction I thought they should be moving in -- and I was initially pretty non-committal. But eventually I suggested that they might in the coming year focus intensively on aspect of their educational program, with attention to issues of goals and outcomes. Using the example of the Hebrew curriculum, I suggested a number of questions that could be included in this inquiry: 1. What are the announced goals of your Hebrew curriculum? 2. Assuming these can be discovered in curriculum-guides and/or mission statements, are these goals clear enough to offer guidance? 3) Why these particular goals? why are they important? 4) Do parents, administrators, teachers, etc. understand and identify with these goals? 5) Are these goals adequately embodied in the existing Hebrew curriculum? 6) What relationship is there between these goals (and formal curriculum) and what actually goes in classrooms that are, in theory, organized around the Hebrew curriculum? 7) What are the outcomes of the students' educational experience (in relation to the Hebrew curriculum)?

There was a lot of enthusiasm for the idea of focusing on one particular dimension of the School's educational efforts. I myself liked the idea for the following reasons: 1) it seemed doable, to a lesser or greater extent; 2) it seemed meaningful in 3 distinct ways: a) it might help clarify issues relating to the Hebrew curriculum; b) it would offer a springboard into larger questions of educational purpose; c) the different dimensions of this inquiry (an inquiry defined by the kinds of questions indicated above) would serve to initiate participants into a number of critically important ways of thinking and forms of discourse that would then be generalizable to other domains. Finally, 3) this seemed to the kind of an investigation that could be meaningfully carried out even prior to the arrival of the new Rabbi; done responsibly, it would not pre-empt his efforts to put his mark on the character of the school.

On the assumption that it might prove useful to focus on one dimension of the school's educational efforts (along the lines specified), attention focused on what should be the object of that focus. There was some conversation about what "what to do with the 7th grade" but eventually the group gravitated back to the Hebrew curriculum.

By the end of the meeting, the sense of this group was that it would propose this kind of an inquiry to the Board, and that the best way to do so would be to put before the board a carefully developed plan (worked up in writing). Towards that end this group scheduled another meeting in mid-June. I suggested that Kathy Schwartz be asked to present to this small group a first-draft plan at this meeting, and they all concurred. I offered to review the plan and to help Kathy formulate the first draft over the next couple of weeks. I will be calling her

to invite her to come to Madison for an afternoon to work on it together.

Beyond agreeing to help out with developing the plan, I committed no CIJE resources to the proposed effort; but the truth is that I am extremely interested in seeing what the potentialities of this kind of an initial approach are. Intuitively, I think it very promising, if approached carefully.

MILWAUKEE JEWISH DAY SCHOOL

Background. As you know, MJDS is a community-school, not affiliated with any denomination. It prides itself on its pluralism and inclusivity; at the same time, its mission-statement describes it as a "religious school". Of the various institutions that had participated in the Goals Seminar, MJDS had from the very beginning seemed the most promising. Led by their director, Doris Schneidman, the MJDS team seemed serious and engaged from the start; and in contrast to some of the other institutions, it brought the same team of individuals to each meeting. A principal reason for this is that this school seems to be seriously concerned with clarifying its Jewish mission, and one or more committees have been involved with this effort for some time.

Three pertinent local circumstances are worthy of mention. First, the school's director, Doris Schneidman, strikes me as a strong leader; she seems to have real presence, and my initial sense is that the school really takes shape around her personality. I find it hard to read Doris' relationship to the Goals Project effort. On the one hand, she has expressed a lot of interest in it: she showed up at each session of the seminar and brought out the troops; and she also has expressed an interest in moving on with us to Phase II; on the other hand, in between meetings, I find her very, very hard to get hold of, and she hasn't followed through with certain assignments (for example, the short written piece that was to have been submitted prior to our May meeting). My intuitive sense is that these worrisome phenomena don't reflect ambivalence about involvement in our project, so much as her administrative style - but I could be wrong about this. In any event, my sense is that if we're to make progress with this institution, having her very solidly on board is crucial.

Second, MJDS failed this year in its effort to recruit a new head for their Judaica program. As you probably know, the position had been offered to Roberta Goodman, but she turned it down. Doris did meet up with a promising individual last minute (Tzipporah Altman-Shafer, whom I had known through the Cleveland Fellows Program), but by that time Altman-Shafer had taken on another position). In any event, this is in an important sense an interim year for this school.

Third, Jane Gellman is actively involved with this institution, and a member of the team that came to our seminars. Whether - and if so, how - this will prove relevant to our relationship with this institution I am not yet sure; but in general, my sense is that Jane plays a constructive role, thoughtful and not domineering.

The meeting. In addition to Ruth Cohen and myself, participants at this meeting included Doris Schneidman (the principal); Jane Gellman; Jay Beder (a math professor, Orthodox but very pluralistic in his outlook - and enormously constructive); Rick (the outgoing chairman of the Board, who has been very energized by the goals-seminars and perhaps a driving force in keeping the institution engaged with the effort); and a woman named Sylvia (whose role in the institution I'm not sure of, but who has been thoughtfully involved with the process from the very beginning).

For two reasons the meeting (scheduled for one and a half hours) got off to a slow start. First, Doris was about 15 minutes late; second, she had not written up a summary of what had been agreed on at their earlier meeting. So that when Doris did show up, the first ten or fifteen minutes was spent reconstructing what had been agreed to at that meeting from Doris' notes. Nonetheless, once the meeting got moving, it proved very interesting, and below I summarize what happened in relation to the central themes around which the discussion developed.

1. This group of MJDS stake holders was surprised, genuinely moved, and excited by the discovery, during the Goals Seminars, that it was possible for a group as Jewishly diverse as themselves to enter into meaningful dialogue around questions of Jewish life and practice. More than one of them had been fearful that the attempt to discuss with each other their own views on such matters would create destructive tensions. Instead, they found the process extraordinarily rewarding and stimulating. It came as a great relief to discover that it's possible to talk about such things in a pluralistic community; and they are grateful to this seminar process for allowing this to happen.

Out of this experience emerged a desire to see this experience replicated for other groups within their membership, especially the board. In this connection, some of our time was spent trying to articulate what it was about the seminar-setting that made it possible to discuss issues of Jewish vision and commitment in a way that felt safe to participants. No closure was reached about this matter, but the fact that the seminar format encouraged reflection and sharing, while discouraging the effort to arrive at agreement concerning ideology and practice, may have been a significant contributing factor. In any case, it seemed clear to participants that it would be desirable to engender a climate that encouraged engagement and thoughtful

candor, without a sense of threat.

2. In a similar vein, one participant noted the seminar provided her with the first occasion ever for having to wrestle with the question of what it means, or might mean, to be a Jewish school. She indicated that her own "Jewish background" is not very strong, and she has welcomed the opportunity to begin thinking about what the Jewishness of a Jewish school might consist in -- a question that never even rose to consciousness in the past. (I used her comment as an occasion to stress the importance of including study of Jewish sources as an important element in the process of clarifying the school's Jewish mission.

3. There was continuing anxiety around the pluralism issue. The anxiety (as expressed at this meeting) did not focus on what would happen if people tried to discuss issues of Jewish vision and goals; rather, there was some concern that some parts of their membership would feel driven away or marginalized if the School became more or "too Jewish".

On the other hand, the point was made forcefully (I believe by Rick, the Board President) that a failure to wrestle with questions of vision and to become more vision-driven will in the long run also be very costly, though in a very different way. The School, he insisted, needs, if it is to be a Jewish school, to address these matters seriously.

4. There was an interesting, if preliminary discussion of the kinds of goals that even a fairly broad pluralistic community could readily agree to, and some excitement developed as they began to feel that it might in fact be possible to generate some shared goals.

There was in this connection a share sense that it would be possible to generate agreement around goals having to do with "knowledge" and "love of study"; but anxiety was expressed about a goal that spoke of "making Shabbat a special day."

5. At one point in the meeting, Ruth Cohen suggested that instead of, or in addition to, beginning the institution's goals-process "up in the sky" [my phrase, not hers] with broad questions of vision, it might be possible and desirable to use concrete events or problems in the life of the school as a springboard to reflection on important issues of vision and goals. As an example, she pointed to David Shulker's announcement last week, based on some interviews with 8th grade students, that not one of them would want to study at a community-high school (were there one available). Said Ruth: "The gap between the school's aspirations and this outcome might be a great starting-point for reflection on the school's goals and their relationship to practice."

Ruth's idea of using immediate events and problems as catalysts for reflection on the institution's priorities, goals,

and effectiveness is excellent. The problem is that sometimes such immediate stimuli are simply 'too hot' to allow for thoughtful discussion. In fact, this difficulty was illustrated by the responses to Ruth's comment. Immediately her idea (and perhaps Ruth herself) was hostilely jumped on by those present. They were, it was apparent, furious with David Shulker for drawing and making known to others what they believed to be an unwarranted inference based on his conversation with the 8th graders. That the 8th graders spoke disparagingly of the possibility of going to a Jewish Community High School did not, in their view, warrant a negative assessment of MJDS nor of the likelihood that some of these children might, if suitably prepared, be enthusiastic participants in a Community High School. A number of ingenious - and possibly on the mark - explanations were then offered to account for the responses that these earlier adolescents had offered Shulker.

In any event, in vain did Ruth Cohen repeatedly try to explain to the group that it wasn't the particular example but the general idea of starting with a concrete incident that she was interested in; and eventually the discussion was abandoned as unproductive.

This case is important for more than one reason: 1) it offers some insight into MJDS, and especially into a defensiveness that may lurk near the surface. It was striking that nobody was able even to consider the possibility that there was something to learn from Shulker's data; instead, all the energy went into discounting it; 2) the case offers a good reminder that though starting with immediate incidents in the life of an institution may make energized engagement possible, it may also preclude thoughtfulness; hence the need to select and approach such incidents very carefully, if engagement with them is to be productive.

5. Along with general agreement among the group concerning the desirability to engage others in higher-level discussion of questions of the school's Jewish purpose, there was also some interest in gathering data that helped to reveal current reality. In general, there was a feeling that it might be valuable and interesting to "take stock" of what is now happening (by looking at, say, existing mission statements and their relationships to formal curricula; or at the relationship between formal curriculum and what happens in classrooms; or at the outcomes of education at MJDS). But there was also some uncertainty about what it would be desirable to look at. For example, there was disagreement concerning the wisdom of soliciting information from parents concerning Jewish family practices.

6. In discussing the possibility of examining existing goal- and mission-statements, I noted a gap between the strong emphasis in the general mission-statement on developing positive attitudes towards Jewish life and practice and the emphasis in their statements of curricular objective on cognitive outcomes. This,

too, prompted a kind of defensive response -- along the lines of "Our attempt in this curriculum guide was to re-dress the balance in a school that very heavily emphasizes the attitudinal dimension."

7. Near the end of the meeting, I indicated to them that, consistent with other priorities and depending on the plan of action they end up ratifying, CIJE would be interested in working with them in this process. I offered two reasons: 1) their seriousness; 2) our own interest in working on goals in a communal, pluralistic institutional setting. They seemed pleased with this assessment, and indicated that although they had entered the seminar-process skeptical, they were interested in going further. Doris added that she thought CIJE could learn some interesting things by working with an institution like hers, and I concurred.

At the same time as there was enthusiasm in the air, there were a couple of notes of concern. Jay Beder, whom I view as critical to their process, expressed some concern about the amount of time he was spending in meetings this year, leaving open the possibility that he might need to pull back from the process. And, after the meeting, Jane expressed her sense that the group may be feeling overwhelmed with the task-at-hand and would have wanted a clearer sense from CIJE of what it was prepared to offer.

8. By the end of the meeting, it was agreed that there would be a follow-up meeting focused on two major questions:

- a. how "get the conversation (concerning vision and goals) going" among other sub-groups in the MJDS community in the coming year;
- b. what kinds of data would be worth gathering, and possible to gather, as part of an initial "taking-stock" effort.

It was also agreed that Doris Schneidman and I would meet prior to this follow-up meeting to prepare for that meeting. Due to end-of-year schools activities, the conversation with Doris is unlikely to take place until the last part of June. (As I've intimated elsewhere, I am a bit nervous about whether and how Doris will follow-up with this matter in the way that she agreed to).

MEETING WITH RUTH, JANE AND LOUISE CONCERNING STATUS OF THE GOALS PROJECT IN MILWAUKEE

Ruth, Jane, and Louise all seem enthusiastic about going forward with the Goals Project, and because of their institutional affiliations Jane and Louise have an interest in the project that goes beyond their Lead Community roles. They

are excited but still uncertain about what Phase II will look like, including what they can reasonably expect from CIJE.

I tried to convey to them, and encouraged them to convey to those I had met with, the following:

1. CIJE has an interest in being involved with Milwaukee institutions interested in moving forward on a goals-agenda.

2. CIJE involvement would, however, be limited and conditional; it is not "a blank check" investment of time, energy or other resources. CIJE involvement will depend on: a) continuing evidence of seriousness on the part of the institution; b) the nature of the institution's plan and whether CIJE viewed it as sufficiently thought-out and sensible; c) other CIJE commitments (with other institutions in Milwaukee and elsewhere).

3. The first step for any institution interested in going further is to develop a preliminary conceptualization, or plan of what it hoped to do. I indicated a willingness and desire to participate in helping to develop this plan.

NEXT STEPS IN CIJE'S MILWAUKEE GOALS PROJECT

1. Send letters to each institution highlighting what was agreed to, next steps in the process, and the conditions/nature of CIJE involvement with the process.

2. Follow-up meetings between me and Lee Buckman, Doris Schneidman, and Kathy Schwartz, in preparation for their next Goals Project team-meetings.

3. Meet with Ruth, Jane, Louise, Ina, Lifsa and Gail concerning the integration of Goals Project activities into other activities going on as part of Lead Community Project.

4. In August, meet with the JCC's team (and possibly that of Yeshiva Elementary School).

5. Given my fairly good relationship with a number of key community-stakeholders (including Rick Meyer, Jerry Stein, the Lead Community lay and professional leadership, and Dan Bader), the thought of organizing some sessions around the theme of community-vision is quite intriguing to me, and I would like to discuss with CIJE colleagues some ideas concerning how to proceed with this.

6. My sense is to avoid concrete commitments of time to any of these local projects until after our July meeting in Boston. At

that point, I am hopeful that we will be in a better position to judge what would be a sensible allocation of resources.

OVERALL ASSESSMENT OF THE MAY MEETINGS IN MILWAUKEE

1. As hoped, we emerged with the possibility of working with individual institutions in the months ahead. In view of our interest of enhancing our understanding of such work in preparation for cultivating a cadre of coaches, this outcome is particularly important.

2. Because of our own interest in working with institutions in the immediate future, I may have been laxer than I otherwise might have been concerning conditions for working with us. In the case of MJDS, for example, which had not put together the requested written document, I might under other circumstances have said: "You're not ready to go forward yet; if and when you are, let me know;" but given our own needs, this did not seem wise.

3. While the agenda for the first 3 meetings had been clear, the structure of this last meeting was less well-formulated. It wasn't, for example, always clear whether I was to chair it, or the institutional leader. Nor was it as clear as it might have been what outcomes to strive for at the meeting. With the benefit of hindsight, it might have been a good idea to distribute a form to the meeting, to be used in developing a plan of action.

4. Note that there has yet to be a formal evaluation of this set of seminars by the participants. I developed a form last week, and Ruth Cohen has now distributed it to the participants. With follow-up calls on Ruth's part, we are hopeful of a getting a good response.

5. I have found these seminars an enormously valuable learning tool. The most recent example was the emergence in my meeting with Temple Sinai of an approach to the Goals-Process that I think might be of value in a variety of settings: namely, the idea of identifying a single dimension of the institution's work, e.g., Hebrew, and using it (in ways specified above) as a way of initiating key stake holders into a number of critical kinds of discourse.

6. My work with Milwaukee, as well as some of Toren's experiences in Cleveland this year, lead me increasingly to the view that while we might come upon institutions that are ready for being party to the kind of intensive coalition of institutions we've sometimes talked about, there may be many institutions, in their own way serious, who are eager and ready for something less than this but nonetheless important. I think we need to be thinking about how to respond to such institutions. Indeed, working with institutions among more limited agendas might be the best way of

slowly generating a clientele for a fuller vision-and-goals agenda.

May 28, 1995

Rabbi Lee Buckman
Congregation Beth Israel

Dear Lee:

Though a quieter setting might have proved helpful, I found our meeting last week very interesting and productive. While, as we have discussed in the past, I continue to be uncertain concerning how deep and widely shared the interest in serious reflection on goals and guiding vision runs in your congregation, I sensed a great deal of thoughtfulness and interest on the part of the participants at our meeting. As I think about the future, it occurs to me that an important ingredient in the overall picture is whether the Congregation's president is, or can be brought, on board with this project. Below I try to summarize the major direction of our discussion and where we arrived.

The starting-point of the discussion was the thoughtfully developed draft of a plan that you and your team had prepared in anticipation of this meeting. The plan emphasized the need to develop among key stake holders, especially members of your Board, a sense of shared vision; and the assumption seemed to be that, once developed, this shared vision could be communicated and embedded across different synagogue settings, especially the school. You indicated that a kind of curriculum for the program of study you proposed for your Board had already been developed by one of your colleagues and had been implemented successfully. You also appended to the plan a draft of a vision for the congregation.

The discussion that built on this document raised questions and invited clarification concerning a number of matters, including the following: 1) Was the goal of the proposed program of study to develop understanding and commitment to a pre-determined vision, or was the vision to be developed - in part or in toto - through the interaction with the participants? 2) Was the goal of the program of study to develop an understanding of the congregation's vision, or also enthusiastic identification with it? If the latter, what implications might this have for the organization of the program of study? 3) Since members of the existing Board have not been expected to engage in the kind of study being proposed and may not be naturally disposed in this direction, might this cause problems in getting the program of study successfully off the ground? 4) Might there be important congregants that are not on the Board engaged in the proposed process of education? 5) Might there be fruitful ways to begin a process of reflecting on the state of goals and vision in the school even prior to completion of the study-process that has been proposed?

Discussion of these varied matters was very rich and, not surprisingly given their difficulty, in most cases inconclusive. We did, as I understand, it move towards the following tentative conclusions:

1) As background to a forthcoming conversation between you and myself designed to further clarify a plan of action, you will be sending me a copy of the curriculum you have thought to use with your Board.

2) Perhaps the theme of Vision - "Who are we as Jews, what does it mean to be a Conservative Jew, etc.?" -- could be interpreted not as a theme for the Board alone, but for the Congregation as a whole in the coming year. This would mean that a number of simultaneous efforts would go on with varied constituencies to encourage serious reflection concerning questions of guiding Jewish vision and purpose.

3) Simultaneous with the exploration of these broad questions of Jewish purpose and meaning, it might be valuable to begin a process of better understanding present educational realities within the Congregation. A process of "taking-stock" might go on, an attempt to gather data that would illuminate the way goals do and don't fit into existing educational efforts, and with what impact. With respect to this matter, we began a discussion of the kinds of data that might be of interest, as well as the possibility that some of it could be collected by educational personnel and/or members of the Congregation. In addition, you indicated that you would welcome CIJE help in gathering certain kinds of data. I indicated that certain kinds of CIJE help, especially from me, might be forthcoming, but this would have to be judged based on a comprehensive plan of action.

These ideas are, of course, all subject to re-examination, and certainly they need to be developed. But they represent a good start! My own assumption is that the first step is to develop a thoughtful and do-able plan of action, and I will be happy to offer help with the development of such a plan in the weeks ahead. The nature of CIJE's involvement with your effort beyond the development of the plan will be determined based on the nature of the plan and the seriousness and energy with which key stake holders in your Congregation are approaching this important matter.

Let me close by commenting on how impressed I am by the seriousness with which you personally have approached the seminars and the larger and very important question of articulating a compelling set of goals that can guide your educational program. I am hopeful that you will find or be able

to generate support for this effort in your Congregation. I look forward to working with you on such matters, beginning with our upcoming conversation.

All the best,

Daniel Pekarsky, Consultant
CIJE

May 28, 1995

Doris Schneidman, Principal
Milwaukee Jewish Day School
Santa Monica
Milwaukee, WI ZIP

Dear Doris:

I am writing as a follow-up to our meeting last week in Milwaukee. As usual, I found your team serious, lively, and thoughtful, and I thought the discussion was very interesting. As I mentioned during the meeting, I have been impressed with the seriousness with which you and your team have approached the Judaica dimension of your institution and I am confident that a working relationship between MJDS and CIJE will prove mutually rewarding. Assuming continued seriousness on the part of MJDS in working with CIJE on questions relating to the clarification and embodiment of the school's vision and goals, CIJE will be pleased to serve as a resource to you in this process. The exact role it can play will be determined based on the kind of plan MJDS arrives at, and the first order of business is probably the development of such a plan. On behalf of CIJE, I will be, as indicated at our meeting, delighted to serve as a resource to you in the development of such a plan; and I am assuming the two meetings scheduled for this summer -- the first between you and myself, and the second for your team (with me probably present) - will be concerned with articulating this plan.

As I understood the course of our meeting, there was a fairly strong sentiment among your team that it would be desirable to create among other sub-groups that are part of MJDS the kind of thoughtful, non-defensive conversation concerning questions of Jewish life and purpose that you experienced together in the course of the seminar. The sense of the group seemed to be that such conversation would be most likely to take place if it were not tied in too immediate a way to questions of practice. Second, there was an interest in trying to discover what shared goals amongst the bulk of your diverse constituency might be discovered through a process of thoughtful reflection; this was coupled with a measure of anxiety that some part of your membership might feel marginalized by this process and its results, feeling that the school was becoming "too Jewish". Third, though there was considerable uncertainty concerning precisely what data to gather, there seemed to be a substantial interest in getting a clearer sense of "current reality" in the school in the domain of Judaica: for example, what are our announced goals? Are they clear and shared? How are they reflected in formal curricula? How are they reflected in what goes on in classrooms?, etc.

We agreed near the end of the meeting that this summer's

planning agenda would focus on strategies for "getting going the conversation concerning vision and goals" and on the kinds of data concerning current reality that it would be useful and feasible to gather. If other, as yet unconsidered ways of stimulating thoughtful conversation concerning goals and vision come to mind, we should be exploring these as well.

I look forward to pursuing this shared agenda with you in the weeks and months ahead.

Sincerely,

Daniel Pekarsky, Consultant
CIJE

May 28, 1995

Rabbi Terry Buchmann (sp.??)
Temple Sinai
ADDRESS

Dear Terry:

Given the number of transition-related matters you are probably having to attend to, I was more than glad that you were able to make it to our meeting last week. I thought the meeting was very productive; and although there is obviously a limit to how much can be accomplished until a permanent Rabbi is in place I emerged from the meeting with the sense that some significant work could be accomplished in the year ahead.

In particular, I felt that the decision made at the meeting to focus on one particular dimension of the School's work - the Hebrew curriculum, and to examine it from a number of distinct viewpoints which will jointly illuminate what is and what ought to be happening represents a worthwhile and do-able undertaking. The project might well encompass a number of distinct kinds of question, each calling for a different approach. These questions might include the following: 1. what are the announced goals of the Hebrew curriculum - and are they clear, known to participants, and identified with? 2. to what extent does what goes on in classrooms a reflection of the announced goals? 3) To what extent are the outcomes of the School's Hebrew program consistent with the goals? 4) What would the program have to look like if outcomes and announced goals are to be closer to one another?

Precisely which of these questions are to be explored, or whether there might be others that need to be added to the list, is a matter to be determined through continuing deliberation this summer. The important point is that this kind of project has the potential not just to illuminate the Hebrew curriculum but to lead to reflection on questions of basic educational purpose; moreover, the investigative tools learned in this one domain may well prove transferable to others.

My understanding is that the team that met the other night will meet this June to review a written proposal that will have been developed by Kathy Schwartz; and that revised proposal put together by the team will then go to the Education Committee for approval. I am hopeful that with your support, as well as that of Kathy, the new Board Chairperson, and other members of team, the Board will approve the direction that is being proposed. As I mentioned at the meeting, I will be delighted to consult to Kathy over the next few weeks as she works up the initial draft of a plan; and I would be happy to comment on later drafts as well. Assuming that the plan is developed and approved, I would certainly leave open the possibility of continuing CIJE help to

this project, but whether and how CIJE can be helpful to you, consistent with its other commitments, is a matter best judged as we move along.

By the way, I wanted to express my appreciation for your candor concerning the problematic matter of the decrease in school hours and your sense of its impact on the educational program. This matter clearly seems worth addressing. I also felt that the conversation concerning difficult priority-choices that need to be made with the cut-back in time was a very fruitful one.

I was impressed by the folks sitting around the table the other night - by their thoughtfulness and by their eagerness to improve the educational program; and as I said above, I am growing increasingly confident that they have a good chance of making significant forward strides. At the same time, it is clear to me that your presence will be sorely missed.

I have enjoyed the brief opportunity I have had to get to know you and your wife. My best wishes as you make the move southward.

B'Shalom,

Daniel Pekarsky, Consultant
CIJE

P.S. Please feel free to share this letter with participants at our meeting. Also, please remind Kathy of my offer to help with the development of a plan of action. I will contact her to see if it's possible to find a time and place to meet.

CIJE Cambridge Consultation 2/95

Bridging Worlds

Today: Consultation re: GP

My hopes ~ Projected Activities: Work w/ Is around goals

Want Clarity re: Nature of Work + 2 Elements - ^{MEE} "Coaches"

Coaches: skills, knowledge, qualities ^{what}
↳ + How cultivate? Content - ^{who} _{when}

Practical Next Steps: Identify/recruit; Learn/Plan..

Background

GP's guiding assumptions: 1) Critical - ^{Direction} Evaluation

2) Weakness: Absent, Vague, Not compelling, not embedded

→ GP Agenda: → Encourage & Support institutional efforts
- Emphasis on wrestle w/ Jewish content
- Knowledge-base via prototypes
+ "Community-vision" ??? Let hang

Constrained by ① Limited personnel ② Knowledge-base
w/ to do

Projected work of institutions as culmination of a process

Summer Seminar → Local Seminars → Identify serious institutions

Milwaukee follows this course:

↓
35, representing 6 institutions - good start.

Two Reasons for Local Seminar Route

- ↳ 1) Makes good sense 2) Need to build capacity

Build Capacity: a) Knowledge-base b) Coaches

And this brings us to the central questions concerning the work: role of Coaches, nature of

Guiding Principles 1) change ~ goals

2) Goals + Content, Authentic, embedded, understood

3) Multiple Rts. ?? No formula

4) Stakeholders

5) Monitor!!

↓ openness + repertoire

self-study Evaluation

2/21/ Fullan

Role of Coach - Given presupposition of
readiness

Jan. 3 Doc - p. 9

@ My concern: Drift to Vague Consensus
Impatience w/ Study

Seymour: Phil - Ph.D. of Ed. - Curric - Implem-
↓
Evaluation

At what level, would coaches
work?

→ How understand work of coaches
what the concerns?

Dear Danny:

It was great to see you again.

Enclosed please find

report for SF on the goals project meetings.

I hope it is useful for your preparations.

Danny

MEMO: 23/1/94

TO: SEYMOUR FOX

FROM: DANIEL MAROM

RE: REPORT ON MEETINGS WITH PROFESSOR

DANNY PEKARSKY

ON THE CIJE'S GOALS PROJECT

Dear Seymour:

The following is a report on the meetings we held with Professor Danny Pekarsky on the Goals Project. These meetings were convened at the Institute in the period between Wednesday, January 12 and Sunday, January 16. You, Shmuel, Danny and I met for over twenty hours during this period in order to assist Danny and the CIJE in considering various aspects in the planning and implementation of the Goals Project in Lead Communities ("LC's").

The deliberations were focused in four major areas:

- 1) Establishing a common understanding of the theoretical basis of the Goals Project:

We began the deliberations by attempting to arrive at a common formulation of the theoretical basis of the Goals Project. The reasoning here was that discrepancies in this understanding would keep us from moving into a detailed discussion of possibilities for implementation. As it turned out, though each of us had studied the documents and written communications which summarize and refine the theory of the Goals Project, there was still much room for "setting the ground rules straight." Indeed, it took almost half of our meeting time to ensure an appropriate level of common understanding.

The following are major points which emerged from this effort:

- a) The central thesis of the Goals Project is that effective education derives from an ongoing attempt to implement a profound and informed philosophical vision of the desired aims or ends of the educational process.

b) This thesis has two aspects. On the one hand, there is a technical aspect. The thesis assumes that educational aims which are the product of thorough philosophical inquiry and which are clearly and distinctly formulated will guide those who must implement them more effectively. Such aims will focus educators' creative energies and provide them with a criteria by which to evaluate the success of their activities. On the other hand is an organizational aspect. The assumption here is that by developing consensus and mobilizing the efforts of various players within an educational institution around a common vision, one can develop in that institution an atmosphere or culture whose impact will be that of a whole which is greater than its parts. In such an environment, the educational message will have a chance to engage students in multiple modes and contexts and will thereby have a greater capacity for impact.

c) Ideally, progressing from the formulation of a philosophical vision to its actual implementation would happen in a number of stages. Stage #1 would be to develop the philosophical vision of the desired ends of education. Stage #2 would be to "translate" this philosophical vision into an actual description of an educational institution at work. Stage #3 would be to derive operative principles, guidelines, or goals from this description. Stage #4 would be to design educational programs which attempt to achieve these goals and to train staff to work with them accordingly. Stage # 5 would be to actually implement these programs. This would be followed by an evaluation of the implementation. This evaluation would seek out ways of improving practice by locating difficulties and errors at any one of the above stages. This development would then be transformed into an ongoing attempt at implementing the vision or refining its formulation.

d) Since what should emerge from this ideal is an ongoing process, the task of setting the ideal into motion can begin at any one of the above stages. Where to set up or enter this process is a matter for deliberation in relation to the specific resources, players, and circumstances who are involved with a given educational setting or initiative.

2) Considering the resources, players and obstacles involved in 2) implementing the Goals Project:

After generating a common understanding around these points, we then moved on to discuss the realities with which the Goals Project should be concerned. The deliberations on this topic were focused in four areas and can be summarized as follows:

a) The audiences: The Goals Project will deal with three audiences:

- lay leaders, planners, and educational leaders (Rabbis, Bureau of Jewish Education staff, etc.) in LC's;
- decisionmakers, administrators & educators in individual educational settings (formal and informal) in LC's;
- leadership and staff of the denominations (including JCCA and possible others on the national level).

The decisionmaking process will vary with each audience. Though it is important to consider each audience in terms of the realities of these decisionmaking processes, it would be mistaken to lose sight of the larger picture when planning initiatives and activities. It was agreed that planning for the Goals Project would necessitate prior research and assessment of where each of these audiences are today vis-a-vis goals development and what could be done with each one of them in short and long-term perspective.

b) The resources: The range of resources for the Goals Project is very wide. One axis includes people. Danny Pekarsky and the staff of the CIJE will have to decide how much of their total time and energy they will want to devote to the Goals Project. Since it is they who will be working with and in LC's on an ongoing basis, their decision will determine the scope of the Goals Project. The Institute staff will be available for consultation and special inputs. This applies as well to special consultants such as the scholars of the Educated Jew Project and experts on goals in education (both those who have studied this topic and those who have created success in working with goals in their institutions). Finally, there is a group of talented senior educators who, for an appropriate fee, could be trained to work closely with those in individual educational settings in order to develop their goals.

Another axis relates to the task of presenting the rationale for goals development to the various audiences. On this axis would be printed matter such as historical and contemporary descriptions of vision driven educational practices and institutions (including from the materials on best practices); narratives of successful attempts to introduce reform in education through goals development; the published papers of the Educated Jew project; vivid and imaginative "future histories" of vision-driven Jewish educational practices and institutions; research which points out the necessity of addressing goals in order to develop effective educational practice; etc.

A third axis relates to the task of engaging the respective audiences in a process of seeking out and working with their goals. On this axis would be moments or situations which can

naturally serve as "springboards" to the discussion of goals. Examples would be: lay leaders' demand of educators for accountability in achieving common goals; a request for assistance in goals development made by individual settings in LC's to the denominations; a study or evaluation of current educational practice which points to a significant discrepancy between actual and desired outcomes; an impassioned and informed call for action in education by leaders in the community; a fresh and energetic initiative made by an inspired educational leader; a public debate on an issue in education; etc.

It was stated that planning for the Goals Project would seem to necessitate the amassing of specific names, materials, and strategies on each of these axes. Such a pool of resources would facilitate the implementation of the project as well.

c) The perception of the project: Despite the fact that the basic idea for the Goals Project has been presented only a number of times to various players among the three audiences, it has already generated much response. Lay leaders in LC's have expressed an identification with the project's emphasis on accountability. Consequently, there is a sense among some of high expectations from the Goals Project in LC's. One group of lay leaders has even expressed a desire to become familiar with alternative conceptions of aims for Jewish education. On the other hand, there seems to be a certain degree of vagueness concerning the Goals Project as well as a lack of understanding about the unique character of developing and working with goals in education. This has led us to suggest that if, indeed, the CIJE intends to convene a summer seminar in Israel on the Educated Jew Project for LC lay and professional leaders, it should deal, in addition, with the role of goals in education in general and in LC's.

The denominations, after having been warned about the request for assistance in formulating and pursuing goals on the part of their constituents in LC's, have also begun to consider how they might play a role in the Goals Project. Though the response to this warning has varied from denomination to denomination, our sense was that they might feel as if the goals statements which they have already produced in various curricular and other published documents could be the basis for their input into LC's. Hence, it was suggested that the bulk of the effort here would have to be in helping the denominations clarify what is involved in helping their local constituents work with denominational goals as well as in refining the formulations of those goals. In relationship to the latter, it was reported that all the denominations have expressed an interest in benefitting from the research of the Educated Jew Project.

d) Obstacles: What emerged at many different moments in these meetings is that efforts at developing and working with goals can be both considerably demanding in terms of time and energy as

well as politically loaded. It was reported that vagueness in formulating goals, despite the constraint it puts on developing effective practice, can often be a useful and efficient way of preserving a safe status quo. Consequently, as was demonstrated by a simulation experiment, efforts at goals development in even a single school will need to be persistent and spread out over a long period of time in order to affect local decisionmaking processes and build consensus around new goals. These and other similar considerations called for careful attention

to questions of priority, scope, personnel and budget for the Goals Project. In addition, it was suggested that alternative routes for implementation should be considered in terms of what they could lead to in one, three, and five years time.

An additional factor which was suggested in the deliberations in this area was the limitation of the Goals Project to settings in

LC's. Since goals development is so demanding, energy will be best invested in working with institutions with a high level of motivation as well as with leadership and personnel which is committed from the outset. This consideration led us to revisit the possibilities of working with a coalition of motivated and committed educational institutions within and beyond LC's (moving back to the 23 communities which applied for LC status).

3. Mapping out possibilities for implementation of the Goals Project:

At this point, the meetings focused on mapping out possibilities for the implementation of the Goals Project in light of all of the above.

In general, it was stated that the Goals Project should seek to catalyze vision-drivenness in lead communities and beyond via:

- a packet or arsenal of pertinent materials including conceptual pieces, examples, strategies & human resources;
- education/encouragement of lead communities in working with their goals;
- education/encouragement of the denominations and others to be pro-active in developing their goals and getting others to work with them;
- developing a coalition of vision-driven institutions in LC's and beyond.

An attempt was made to set out a wide array of possible routes for the implementation of the Goals Project with each of

the three audiences. In each case, these ranged from undertaking an intensive and comprehensive effort in one or more exemplary institutions or subject matter areas (eg. Bible, Jewish History), to mid-range involvement with a group of decisionmakers and educators from a larger number of institutions, to an effort focused on developing catalysts for involvement with goals (eg. generating public debate on the aims of Jewish education through lectures, conferences, reports, etc.).

At one point in this deliberation, a full-fledged suggestion was

presented for working with one of the denominations. This suggestion pointed to the CIJE's focusing the attention of the executive leadership and staff of this denomination on goals statements taken from internal resources (an analysis of the practice of a leading school in light of its goals; an historical study of the curricular goals of the denomination's institutional role for education), while introducing them to methods of developing goals and to one of the scholars from the Educated Jew Project. Having done this, the CIJE would then help the denomination "translate" these "raw materials" into usable goals, as well as recruiting personnel and developing a plan for the implementation of these goals in settings in and beyond LC's.

4. Preparing Danny Pekarsky for the CIJE staff meeting in February:

The meetings concluded with a discussion of the agenda on the Goals Project for the CIJE staff meeting in February. It was proposed that the agenda should include:

- a clear statement of the theory of the Goals Project;
- a summary of factors to be considered in implementation;
- a presentation of alternative routes available for implementation;
- a discussion of the "pros and cons" of each of these routes in light of the above;
- a clear commitment to a specific set of implementation routes.

It was suggested that an effective way to arrive at the last item on this proposed agenda would be a concerted staff effort to develop a future plan for the Goals Project.

It was agreed that Danny Pekarsky would take on the assignment of developing a background document and agenda for the CIJE's discussion of the Goals Project at its February staff meeting and that you, Shmuel, and I would make suggestions and additions if we had any. Also Shmuel volunteered to prepare a

background document on the denominations vis-a-vis the Goals Project and I did the same regarding the task of amassing past and present examples and descriptions of vision-driven education as well as of successful reform efforts through goals development.

Daniel Marom

(could you please send us your fax number in order that we may send you a hard copy of this text, which may be easier to read)